CT Department of Revenue Services Taxpayer Services Division
ADDING WITHHOLDING TO ACTIVE ACCOUNTS

VERIFY THE FOLLOWING WITH CALLER TO DETERMINE IF ACCOUNT CAN BE ADDED BY PHONE:

1. **TID** _____
   - If taxpayer gives you a TID or FID, ask for the name of the business and its address and verify that you have the right account. If yes, **check the box; go to 2**. ☐
   - If taxpayer cannot give you a TID or FID for the account, **STOP** and tell caller to fill out REG-1 to add additional tax type.

2. **FID** _____
   - If FID matches FID on account, **check the box; go to 3**. ☐
   - If no FID on ITAS for account but caller now has FID, write it and add it through ID detail window. _____ **go to 3**
   - If FID is on ITAS but caller gives you a **different** FID, **STOP** and tell caller to fill out the REG-1 to add the new tax type.
   - If no FID on ITAS and caller does **not have** an FID, **STOP** and tell caller to obtain an FID from IRS and call back to add W/H.

3. **Status and Source:** Is there at least on Tax Type in the account with **Status "Active"** and with **Source "Taxpayer"**?
   (Go to Business Entity Screen. Double click on tax type to view this information on status and source).
   - If yes, check box; **go to 4**. ☐
   - If no, **STOP** and tell caller to fill out REG-1 to add additional tax type.

4. Mailing Address for Withholding.
   - If same as mailing address for other tax type, check box; **go to 5** ☐
   - **If new address, print neatly**

     _____
     _____

5. Withholding Start Date _____

6. Print Information Below:
   - Contact Person's Name _____
   - Contact Person's Phone Number_____
   - Payroll Company Name (if any)_____
     i. If payroll company is ADP, Ceridian, Interpay or Paychex, follow directions for adding relationship (#22 in manual) and do not send WH coupons to taxpayer.
     ii. Other payroll service, send WH coupons to taxpayer.